DOCUMENT RESUME

ED 175 809 SP 014 136

TITLE	Interchange: Vol. 1, No. 2, March-April, 1978.
INSTITUTION	Learning Exchange, Evanston, Ill.
SPONS AGENCY	Fund for the Improvement of Postsecondary Education (DHEW), Washington, D.C.
PUB DATE	Mar 78
NOTE	13p.
EDRS PRICE	MF01/PC01 Plus Postage.
DESCRIPTORS	*Community Services; Cooperative Planning; Educational Resources; Fund Raising; *Information Dissemination; *Information Networks; *Intercommunication; Organizational Communication

ABSTRACT

This newsletter is published as an information source for those people in the education field who would like to establish a learning network. In this issue four topics are addressed--starting a learning network, the funding problem, how a survey is conducted to identify potential users, and suggestions for fund raising within a community. (JD)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED175809

INTERCHANGE

JAN 1 10 47 AM '79

A Newsletter for Learning Networks to share ideas, news, techniques, expertise, and resources

VOL. 1, NO. 2 MARCH-APRIL, 1978

U.S. DEPARTMENT OF HEALTH EDUCATION & WELFARE NATIONAL INSTITUTE OF EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Edward K Hoffmeyer

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

THIS ISSUE PAGE

STARTING A LEARNING NETWORK: A CHECK LIST
From Philosophy to Budgeting 1

SELF-SUPPORT AND LEARNING NETWORKS
The Funding Problem.....2

LEARNING NETWORK USAGE: A SURVEY
PARALLEL Looks at its Users.....5

RELEVANT READING: THE GRASSROOTS FUNDRAISING BOOK
How to Raise Money in Your Community.....9

SP014 136

This newsletter is the result of a two-year grant awarded to The Learning Exchange by the Fund for the Improvement of Postsecondary Education (FIPSE), Department of Health, Education, and Welfare, Washington, D.C.

INTERCHANGE: Published bi-monthly to share ideas, news, techniques, expertise, and resources among learning networks. Subscription price is $12 for six issues. Available from:

The Learning Exchange
P.O. Box 920
Evanston, IL 60204

©1978, The Learning Exchange, Evanston, Illinois

THE LEARNING EXCHANGE, TLE, and the TLE logo are trademarks of THE LEARNING EXCHANGE and the use of these without written authorization is strictly prohibited.

STARTING A LEARNING NETWORK: A CHECK LIST

What could be easier than starting a learning network? The concept is beautiful in its simplicity—putting people in touch with others in their community with whom they can learn, teach, or share skills and knowledge. However, applying the concept is anything but simple. Over the past seven years, the number of learning networks that have failed surpasses those still in operation. To create and maintain a viable learning network takes a far greater commitment than merely an appreciation of the concept.

Lack of planning, inadequate funding, and insufficient management skills have been the reasons for the failure of many learning networks. Intense dedication to the concept without the other ingredients is not the formula for success. After the concept is recognized as adaptable to the community—planning, funding, and management should be the primary considerations. The degree to which these elements need to be considered depends on the size of the community and the projected size and usage of the service. Whatever the size, you do want a viable organization providing a quality service. Generally, learning networks have tended to underestimate necessary resources while overestimating what they can do with those available.

Beyond the immediate impact of failure on the service lie the effects on the community and potential communities. Termination of the service could cause difficulty in regenerating the idea at some future date for the same community. But the repercussions can go beyond the community's border affecting other's decisions to start similar services. The success or failure rates of learning networks may influence funding from private and government sources at the local, state, and national levels.

Here is a list of points to study and consider before announcing the grand opening of your learning network. There will be a better chance for success with proper planning, keeping in mind the negative results of poor plannning. This list is not all-inclusive, but merely a means to provide a base for further questions and considerations.

* THE PHILOSOPHY

  Why are you creating this service? What will be the guiding philosophy of the organization and to what extent will it affect policy? Will the philosophy be highly visible or in the background? Will it emphasize social change, social service, an alternative to schooling, or people helping themselves? Will it be flexible or rigid and will it be acceptable to the community?

* THE COMMUNITY

  What needs of the community are you satisfying? What can you expect from the community in terms of financial, moral, and volunteer support? Do you need to take into consideration any special characteristics of the community and its population, e.g. age, occupations, income levels, ethnic background? Can you verify or disprove any of your perspectives of the community by conducting a survey?

* USAGE AND GROWTH

  Can you predict how many people will use the service in a given period of time? How will the users perceive and define the service? How will they want it to evolve? Before defining the service, can you conduct some surveys of the community especially with professional help from local businesses or colleges? Will the service be overextended by providing more than is necessary? Or are you forgetting a vital component? The more you can predict how the service will be used by the community, the better you can predict the organization's needs.

* FUNDING

  This is one of your biggest needs. How will the service be supported? Will there be developmental money available for the first year? Do you want the organization to be self-supporting? Will funding be available from the local business community? Will funding be available from foundations or state and federal government agencies? Will users of the service be willing to support it? Will donated office equipment or space be available? Is there a possibility of cooperating with an existing service or

institution such as a library or community center? What would such a cooperative effort do to your independence and where would you be on the other's list of priorities?

* BUDGETING

  This is a means to predict what you will need in terms of funding. Some items such as salaries and rent can be accurately predicted. Items such as telephone and postage experience periodic increases. Be aware of predicted increases when writing your budget. Other items such as printing can also make a mess of your budget with sudden increases in paper prices. Always allow a section in the budget for such contingencies as well as shopping around for the best prices. Become familiar with the market for items in your budget.

* OPERATION

  How will the service actually function and during what hours? Will evening and weekend hours be essential? What kind of information input and retrieval system will be necessary? Is the system set up for ready conversion to computer? Does the system efficiently provide all the different uses required of it? Will you provide a walk-in service, a phone service, or a combination? Will users be required to register prior to using the service? Will you provide space for them to meet?

* MANAGEMENT

  Who will be responsible for the organization? Will policy be set by a board representative of the community or of the users? Who will implement this policy and be responsible for the overall operation? Will the staff be paid, volunteer, or both? Be sure to prepare adequate financial records (get professional advice) and document your procedures in writing.

* PUBLICITY

  How will you promote the service within the community? Will you need an advertising budget? Can you rely on free public service announcements and word-of-mouth advertising? Can you get help and advice from local celebrities and people in the media? You must constantly remind people that your service is available regardless of the community's size, even though your publicity methods may be affected by it.

* NAME AND LEGAL STATUS

  Choosing a name that accurately depicts the service and does not discourage people from using it can be a big problem. You may wish to seek professional advice or run a contest in the community to name the organization. The contest would also provide some initial publicity. As a non-profit organization, you are eligible to receive tax-deductible contributions. It is best to get professional legal advice concerning incorporation and tax-exempt status.

As mentioned earlier, these are important items to think about, talk about, and resolve before going into business. They also provide much of the material you will need for fundraising proposals and publicity. Be sure to keep written records of your meetings, decisions, and procedures. Expect to raise many more questions than the ones listed above. That will show you are on the right track. The more questions you can answer and resolve at the beginning stages, the easier it will be later.

SELF-SUPPORT AND LEARNING NETWORKS

The Learning Exchange has a goal to become self-supporting through client memberships and contributions. However, the percentage of the operating budget obtained from this type of support has consistently been 60-65%. The balance of the budget must be obtained from other sources— mainly foundations and corporations. While this has provided the organization with sufficient funds, it must still rely on the unpredictable nature of outside funding sources. The

ideal would be to rely on the users of the service to provide 100% of the operating budget. Funds for special or developmental projects would still be sought from outside sources while the basic services could still function if they were not forthcoming.

Admittedly, this ideal may not be applicable to all learning networks. Some networks are within a larger organization and funded by it. They may be subject to the organization's changing list of priorities with their funding adjusted accordingly. Thus, effectiveness or even existence of the learning network may be influenced by such changes as well as the perspectives of new administrators or economic factors which affect the larger organization. Nevertheless, they may function quite adequately for an extended period of time under such an arrangement. The arrangement itself may prohibit financial support from users.

Most learning networks, however, do not have such funding available. They are independent organizations and must actively seek resources available to them. Most learning networks do not have a well-established client support system either. There also seems to be a feeling that learning networks should be available to anyone who wants to use the service, i.e. free. One consideration is whether a mandatory fee, at one end of the spectrum, or voluntary contributions of unspecified dollar amounts or time, at the other end, negate the idea of a free service. The Learning Exchange has chosen a system somewhat in the middle. Anyone can use the service free of charge. There is the option, however, for all users to become supporting members through a set membership fee.

In November and December 1977, a consultant group of MBA students from Northwestern University conducted a study on The Learning Exchange's attempts at self-support. The following is an excerpt from the first part of the report dealing with possible options for self-support.

* * *

STATEMENT OF ISSUE

After six years of operations, the major issue facing The Learning Exchange is their inability to meet their objective of financial self-sufficiency through client dues and contributions. For 1977, we estimate that internally generated revenues will cover only 59.2% of operating expenses despite an optimistic projection of 96.6% by The Learning Exchange at the beginning of the year. The Learning Exchange management states that in previous years, this figure ranged between 60 and 70%.

The issue of financial self-sufficiency calls into question the viability of the service as an "alternative" education model. If a community based matching service is to function as a real option to our current educational system, then it is important the clients value it sufficiently to pay for the services they receive. Of approximately 100 learning networks started across the country, it is estimated that 80 have folded for mainly financial reasons. The objective of financial self-sufficiency has both pragmatic and political implications.

What general types of solutions exist to solve this funding problem? Research, brainstorming and examination of other nonprofit organizations produced these general categories of alternative solutions:

1. Tap other sources of outside funds

Rather than try to meet its objective of self-sufficiency, The Learning Exchange could seek permanent sources of funding from local or state government, a federal agency or a community umbrella organization such as the United Fund. The justification would be that it provides a bona fide public service to the community, and that other educational organizations often receive substantial amounts of government aid, such as public schools and private universities. Another option would be to conduct community fundraising campaigns such as those used by the March of Dimes or YMCA.

2. Charge fees for services

This is probably the most logical option, providing The Learning Exchange can adequately define their units of service. From their viewpoint, the most convenient basis for determining fees is the average cost per user's telephone call, which is simply the ratio of total operating expenses to the total number of telephone calls from clients requesting matching services. According to The Learning Exchange records, the average cost per call ranges from $3.00 to $8.00, with an average around $4.00. However, this basis for setting fees might be

unsatisfactory from the consumer's standpoint, in that clients are more concerned with the eventual success of the referrals than merely with telephone contact with The Learning Exchange.

3. Operate "profit centers"

A popular technique used by nonprofit and business organizations is to subsidize their primary services by providing specialized services at a profit. These are often developed and provided by a special unit in the organization, thus the name "profit center." These could include consulting services, workshops, speakers bureau, publications, etc. The Learning Exchange is already marginally involved in some of these activities.

4. Vertical integration of services

The Learning Exchange currently provides matching services only. They could possibly generate additional revenues by charging fees for helping to arrange classes, assisting in the administration of courses, developing and printing educational materials for teachers, etc.

5. Charge a commission on teachers' fees

Many teachers and educational institutions that charge fees register with The Learning Exchange to solicit students. It would seem reasonable for The Learning Exchange to charge these teachers and organizations a commission based on the amount of income they earn from the students referred to them.

6. Raise or restructure membership dues

Changing the level or structure of dues might generate additional revenues at little expense. Currently, there are four membership categories: one-year memberships for $15, two-year memberships for $25, three-year memberships for $30, and one-year limited income memberships for $7.50. Less than 2% of all members select the multi-year plans, and the ratio of regular to limited income members is approximately four to one, resulting in average dues of $13 per member. It is likely that many of the two- and three-year members pay the additional dues as a show of support for The Learning Exchange, rather than as an effort to save money.

7. Increase the proportion of first callers and free registrants who become paid members, and of current members who renew their memberships

This strategy is aimed at improving the membership "conversion rates" for first callers and free registrants, and the renewal "conversion rate" for current members. For 1977, The Learning Exchange predicted that 20% of all first callers would become paid members, and that 40% of current members would renew. No projections were made for converting free registrants into paid members. Data for the first ten months in 1977 indicate that the conversion rate for new callers is better than expected—29.2%. No data was available for conversion rates on free registrants or current members.

8. Increase the number of first callers

Finally, an obvious approach would be to increase the number of first callers. At current conversion rates this would result in more paid members. For the first ten months of 1977, there were only 9273 new callers, compared to a projection at the beginning of the year of 15,000. At this rate, the entry of new members barely compensates for the 60% attrition rate among non-renewing old members.

* * *

In some ways this excerpt merely restates what has been said and thought many times, but it does introduce an outside perspective. It also presents some new options in self-support mechanisms. In the next issue of INTERCHANGE, the recommendations of the consultant group will be presented along with some reaction to the options from The Learning Exchange. We will also present some of the innovations tried by The Learning Exchange to increase user support.

LEARNING NETWORK USAGE: A SURVEY

The following survey and evaluation was written and conducted by Jack DiGiovanni and Carol Rogers, coordinators of PARALLEL at Western Michigan University. PARALLEL was founded at Kalamazoo College and subsequently established in 1977 at Western Michigan University, Kalamazoo, Michigan. The education level and transient nature of the students make the clientel of a learning network serving a college campus unique.

This survey and evaluation is the first one conducted by PARALLEL and is acknowledged by the authors as needing improvement both in the method and content of future ones. While the population using PARALLEL differs greatly from those using other learning networks, this study has two areas of importance. First, the data collected can eventually show what differences, if any, do exist in usage patterns when compared with similar studies conducted by other learning networks. Secondly, this study can serve as the basis for other learning networks to develop and conduct their own surveys.

PARALLEL: EVALUATION FOR FALL SEMESTER, 1977

INTRODUCTION

PARALLEL is a learning referral service[1] whose function is to match interested learners with teachers, or vice versa, and to match people who simply want to share knowledge together. But the job of learning referral services should entail more than providing matches. The effectiveness of the service depends on whether the people matched are meeting to share human resources. With this in mind, a survey was devised to evaluate the effectiveness of PARALLEL.

METHOD

Six general questions were asked. Four questions were concerned with whether people got together, while two questions were concerned with file updating. (See question sheet.)

The survey population consisted of 220 registrants who signed up to teach, learn, or share between August 30 and November 14, 1977. These registrants were telephoned by 10 PARALLEL volunteers between November 15 and December 12, 1977. Each volunteer was randomly assigned approximately 20 registrants to call, except two members of the team, who were responsible for telephoning 10 more registrants each.

RESULTS

168 or 76.3% of the total 220 registrants at the time of the survey were contacted. 94% of these contacted registrants were college students. The other 6% of the registrants were residents of the Kalamazoo area. The contacted registrants consisted of 71.7% of the total 234 registrants for the entire semester.

A. The responses obtained from the registrants contacted are as follows:

1. Were you given any referrals from the PARALLEL office of people interested in the same topic(s) you were?

YES (109) 65%
NO (59) 35%

2. Were you contacted or did you contact another person who shared the same interest as you?

YES (84) 50%
NO (84) 50%

3. How many times did you get together either by phone or in person to share information with another person(s)?

YES, I did get together (61) 36%
NO, I did not (107) 64%

Of the 36% (61) who did get together, the number of occasions each person met was:

Occasions	1	2	3	4	5	6 or more
Number of people meeting	26	6	7	3	1	18
% of people meeting	43%	10%	11%	5%	2%	29%

Of the 36% (61) who did get together, persons met or currently meeting by number of topics:

Topics Per Person	1	2	3
Number of people meeting	55	3	3
% of people meeting	90%	5%	5%

4. Were there any reasons for not getting together with other people registered in your interests?

Possible respondents 107
Total respondents 67 [2]

a.	Called but unable to meet (time conflict)	(11)	16.4%
b.	Called but no answer, wrong #, phone disconnected, moved, etc.	(5)	7.4%
c.	Other no longer interested	(6)	9.0%
d.	Plan to meet in future	(11)	16.4%
e.	Not enough time, lack of interest	(10)	15.0%
f.	Not enough time, interest still there	(18)	26.8%
g.	Found someone else outside service to meet needs [3]	(3)	4.5%
h.	Match not what he/she had in mind	(3)	4.5%

5. Will you have the same address and telephone number next semester?

YES (146) 87%
NO (22) 13%

6. Do you want to be registered in some new topics? [4]

YES (10) 6%

6a. Do you want to keep the old (present) ones?

YES (110) 65%
NO (14) 8%

1.	Moving	(8)	5%
2.	Lack of interest/too busy	(2)	1%
3.	Dissatisfied with service	(2)	1%
4.	Other	(2)	1%

B. 36% of all registrants contacted met at least once with another person(s) to learn, teach, or share.

58% of the registrants contacted who were given names of possible matches met at least once with another person(s).

92% of all the registrants contacted wished to remain registered with the service.

CONCLUSION

Since learning networks are a relatively new service there is little data to compare this study. In a 1972 study of The Learning Exchange, Evanston, Illinois (Squires, 1972), 85.4% of 439 registrants were supplied with at least one person's phone number when they called, were subsequently contacted by someone, or both. 28.7% of these 85.4% got together for an initial meeting.[5]

In the present study, 65% of the registrants were supplied with at least one person's phone number, while 58% of these 65% met for an initial meeting. Overall 36% of all the registrants got together for an initial meeting.

The data strongly suggests that PARALLEL has been successful in linking human resources together in an informal setting. The results show a considerable amount of people meeting continuously (6 or more meetings) and in one topic. This would suggest that continuity is involved in these successful matches. Likewise, 44% of the people met only once which might suggest that the needs of people were met after one meeting.

Another interesting result is that 92% of the registrants wish to remain registered.

Nationally and locally, the question of why people use learning networks must be analyzed and documented. As learning networks evolve, evaluation should always be considered as a necessary and direct function of managing the service.

FOOTNOTES

[1]The generic term used to describe a service such as PARALLEL is learning network. This term is is generally used for national publications. For local purposes, learning networks may use different terms with which their community can identify. Throughout this report, the terms learning network and learning referral service are synonomous.

[2]Not all the possible responses to this question were obtained (possibly due to the inaccurate wording of the survey). However, a large percent of responses were gathered to give a significant indication.

[3]Categories "g" and "h" evolved because the volunteer callers found there were no categories under which to put certain responses.

[4]See footnote #2.

[5]Squires, Gregory D., The Learning Exchange: An Alternative in Adult Education. (East Lansing: The Board of Trustees, Michigan State University, 1975), p. 17.

PARALLEL FALL '77 SURVEY: Question Sheet

I. Introduction: Hi, I'm from PARALLEL, the learning-referral service. Could I have five minutes of your time to ask you a few questions about the service?

II. Now you have registered in ... (to refresh listener's memory, read off topics he/she has registered in).

1. Were you given any referral(s) from the PARALLEL office of people interested in the same topic(s) you were?

   YES_____ NO_____

2. Were you contacted or did you contact another person who shared the same interest as you?

   YES_____ NO_____

3. How many times did you get together either by phone or in person to share information with another person(s)?

   YES, did get together_____ NO_____
   -- How many times? _____
   -- How many topics? _____

4. Were there any reasons for not getting together with other people registered in your interests?

   a. Called but unable to meet (time conflict) _____
   b. Called but no answer, wrong #, phone disconnected, moved _____
   c. Other no longer interested _____
   d. Plan to meet in future _____
   e. Not enough time, lack of interest _____
   f. Not enough time, interest still there _____

5. Will you have the same address and telephone number next semester?

   YES_____ NO_____

6. Do you want to be registered in some new topics?

   YES_____ NO_____

6a. Do you want to keep the old (present) ones?

   YES_____ NO_____

APPENDIX

The following is a breakdown of subject areas registered with PARALLEL for the entire semester (August 30 - December 14):

			Total # within category
I.	HOBBIES, CRAFTS, ART	(22%)	
	Teachers		39
	Learners		52
	Sharers		30
II.	ACADEMIC/DISCUSSION	(23%)	
	Teachers		41
	Learners		60
	Sharers		27
III.	TECHNICAL	(2%)	
	Teachers		2
	Learners		10
	Sharers		0
IV.	RECREATION, GAMES, SPORTS	(26%)	
	Teachers		37
	Learners		51
	Sharers		57
V.	LANGUAGES	(10%)	
	Teachers		7
	Learners		38
	Sharers		13
VI.	MUSIC/DANCE	(16%)	
	Teachers		22
	Learners		51
	Sharers		16

RELEVANT READING

THE GRASS ROOTS FUNDRAISING BOOK: HOW TO RAISE MONEY IN YOUR COMMUNITY

by Joan Flanagan for The Youth Project
The Swallow Press, Inc., Chicago, 1977

Joan Flanagan, a former volunteer and office manager for Citizens Action Program (CAP) in Chicago, traveled, interviewed and worked as a volunteer in fundraising activities to gather and distill the experience and expertise of more than 600 people and 150 organizations into this book. The result is a wealth of information and advice about numerous fundraising activities, a welcome discussion about the need for money to support community-type organizations, and the psychology of fundraising. As described by the author, grassroots fundraising is collecting money from individuals to whom you sell the idea of supporting a particular organization.

Ms. Flanagan points out fundraising is as much selling as is the marketing of any product. You accentuate the positive aspects of your program in such a way that they are attractive to your potential buyers. She recommends adapting to your program professional sales techniques that are creative and successful. No matter what method you use to raise funds, you need to sell your program and yourself to the people you contact. Among the problems of asking for money is the fear of asking for money. For many people, there is the need to overcome the fear of being rejected because you don't receive if you don't ask.

The author suggests successful fundraisers employ good business practices as well as good sales techniques. Sufficient planning, publicity, and accurate records of activities, expenditures and income provide for an effective fundraising campaign. A general rule is to raise the most money in the least time so you can concentrate on the organization's primary goals. Fundraising is only a secondary, although necessary, activity and the less time spent on it the better. Another recommended practice is to make it as personal as possible to the giver. Keep in mind the main reasons people give—it's in their self-interest or you are selling something they want anyway.

A good portion of the book deals with the mechanics of putting on specific events with the ideal event being one "which raises money, conveys a message about your program, and offers something for the spirit." The elements involved in putting on a large number of events are outlined (an exception is the telethon and radio marathon which she dismisses as too expensive and too much work), as well as extensive bibliographical references to other sources for additional information about specific events.

The events themselves are listed in categories for beginning, intermediate, and advanced practitioners of the art of fundraising. Whether you want an event requiring no money and little time to produce or a $1,000 and a year's planning, the book provides a variety of possibilities. For producing a bake sale or potluck dinner, a holiday bazaar, an annual dinner with a celebrity speaker, a weekly Bingo game, or an ad book, there is much in this book to help you. Besides the actual suggestions for events, valuable information is provided on planning, estimating costs, checklists, and profit formulas. This section also provides themes to adapt to your fundraising activites and can serve as a basis for brainstorming your own original events.

Finally, Ms. Flanagan deals with a variety of related subjects, including among others: book-keeping, publicity, and suggested sources for additional information about fundraising. The chapter aptly entitled "Fundraising Forever" points out a truth learning networks have taken a long time to recognize:

> Although it is always a good idea to try to raise more money from sources outside the membership, you must still depend on dues for your basic subsistence. This is the best guarantee that you will never go out of business as long as you are doing what the members want to do.

A good basis for raising funds from institutions is grass roots fundraising. Besides producing needed cash, it shows that people support your organization.

If there is one flaw in this book, it may be its infectious enthusiasm. If you are a novice at these types of fundraising events, talk to someone in the community with the necessary experience for another perspective. Also, be sure to keep in mind the section of the book on the "fundloser."

Considering everything, this book is a real asset when planning any fundraising activities. If not available locally, it can be ordered for $4.75 plus $.50 handling from:

The Youth Project
P.O. Box 988
Hicksville, NY 11802